



7.29.2019

Jason Lawson, Town Manager
Town of Whitestown

Dear Jason:

Thanks for the opportunity to propose on services regarding your human resource needs, specifically, an assessment of the current human resource functions at the Town of Whitestown. Included in this proposal is information about our services and processes as well as our rates and billing protocol. We can further discuss HR Outsourcing and/or HR On-Call services after completion of the assessment.

HR Assessment Process

Our assessment will begin by interviewing current staff responsible (onsite) for the HR function and any key “users” of HR services (other staff, organization leaders, etc). Our interviews will focus on needs and current processes.

Additionally we will request and review policies and forms surrounding these suggested areas:

- Retention and security practices for employee files and HR documentation
- Performance review forms and performance documentation processes
- Employee file contents and compliance
- Collect copy of employee handbook
- Employee onboarding process
- Recruiting including sourcing, selecting, assessments, interview questions, EEO compliance, ATS system, and position offer processes
- Employee relations, coaching, and mentoring
- Compliance with FMLA, ADA, and I-9 form documentation and retention
- Harassment investigations
- Job descriptions, FLSA compliance with job categories and salary levels
- Termination process, exit interviews, unemployment, and documentation
- Benefits enrollment, compensation practices, philosophies, and total rewards
- Internal and external training offerings; policies regarding training
- Metrics on time to fill, turnover, retention, etc.
- Overall structure of HR and breakdown of job functions to serve employees
- Payroll processes



After our interviews and review of relevant documents, we will prepare a written report with top priorities for action, how Purple Ink can assist with actions recommended, as well as general observations and opportunities for improvement moving forward.

Fees and Billings:

The rate for Purple Ink services is \$245/hour and the HR assessment is billed at this hourly rate but not to exceed \$3500 and will include the assessment as well as the report.

Purple Ink will bill upon completion of the report and payment is expected within 10 days of the billing. If either party feels that agreed upon project objectives and expectations are not being met and/or adhered to, that party may terminate the project at will. Project costs will be tabulated through the end of the business day of project termination. It is our policy to thoroughly discuss, plan, and implement plans to ensure all parties' expectations are being met.

We welcome the opportunity to work with you and your team on this HR initiative and look forward to your confirmation!

The terms, pricing, and other information presented in this proposal are valid up to 90 days after the date of the proposal.

Sincerely,

JoDee Curtis, SHRM-SCP, CPA
jodee@purpleinkllc.com
317.418.7327

Laura North, SHRM-CP
laura@purpleinkllc.com
317.730.4772

HR Assessment Proposal Accepted:

Signature

Date

Printed Name



The Purple Ink Promise

Positivity

We love what we do, and we always work with enthusiasm and a JoyPowered™ mindset.

Flexibility

We offer standard HR solutions that can always be fully customized to your organizational needs.

Creativity

We bring extensive HR expertise to the table and often collaborate with external resources and referral partners to ensure maximum success for our client initiatives.

Purple Ink: Inspiring JoyPowered™ Work





JoDee Curtis, SHRM-SCP, SPHR, CPA

jodee@purpleinkllc.com

317.418.7327

Maximizer | Arranger | Positivity | Strategic | Futuristic

JoDee Curtis is the Founder of Purple Ink and the ink pad, author of *JoyPowered™: Intentionally Creating an Inspired Workspace*, and co-author of *The JoyPowered™* family. JoDee has a passion for helping organizations and individuals discover their talents and do more or what they do well!

Prior to founding Purple Ink in 2010, JoDee spent 21 years in public accounting as a practicing CPA and, later, as a Director of HR. JoDee also has experience as a CFO, thereby bringing a unique financial and overall business approach. JoDee obtained her bachelor's degree in business administration from the University of Evansville. She is a Certified Public Accountant, a SHRM - Senior Certified Professional, and a Gallup-certified Strengths Coach. She is a faculty member for National SHRM and co-host of *The JoyPowered™ Workspace Podcast*. JoDee was named the IndySHRM Professional of the Year in 2013.

JoDee is a wife and mother of three humans and two labradoodles. She loves to read and travel, and she serves on the State Council for Indiana SHRM, is Chair of the Strategic planning committee at Our Lady of Mt. Carmel, chairs the board of The O'Connor House, is a member of Pass the Torch 500 Circle Club for Women, is a member of the National Speakers Association, and is a board member for Forum Credit Union.



Laura North, SHRM-CP, PHR

laura@purpleinkllc.com
317.730.4772

Responsibility | Arranger | Relator | Belief | Learner

Laura is an HR Consultant at Purple Ink. She thrives for all levels of employees to understand and truly utilize their benefits to the fullest potential.

Laura joined the team in 2016. Before that, she gained over 10 years of experience in the healthcare and insurance sectors. As a Benefits Specialist, she coordinated the administration of all employee and physician benefit programs for over 800 lives. She also held a high-level claims position for United Parcel Service handling Family Medical Leave and worker's compensation. In addition to benefits, she has experience with recruiting, onboarding, new hire training, payroll, and employee relations. Laura earned a bachelor's degree in psychology from Indiana University, with a minor in business. She is a certified Professional in Human Resources (PHR) and a SHRM-Certified Professional, and a member of SHRM.

Away from work, Laura enjoys being outdoors, traveling and staying active with her two young boys and husband.